Onboarding Guide

This document provides the Project Team with details on the steps, timing and responsibilities for the implementation of eReserve Plus at an institution. It provides a clear way forward for all involved and identifies the resource required for a successful eReserve Plus implementation.

eReserve Project Team

The eReserve Project Team will work closely with Library Staff and IT staff to ensure a successful implementation of eReserve Plus for your specific needs. Implementation will draw on the considerable experience of the eReserve Project Team covering the import of your existing data, integration with key systems and training of your staff as needed.

The project team from eReserve during the Implementation will include:

CEO - Karey Patterson
karey@ereserve.com.au

Senior Customer Advocate - James Leese
james@ereserve.com.au

CTO - Michael Harrison
michael@ereserve.com.au

The technical support team is also on hand at support@ereserve.com.au. We recommend that you post your project communications directly to support as we use a support system that everyone can access which tracks all communications and ensures we are able to provide timely responses.

All customers will have access to the Support System at http://support.ereserve.com.au

Roles and responsibilities

We use a system called Pivotal Tracker which helps the eReserve Project Team work effectively with your team, enabling us to collaborate on project milestones and tasks and ensure everyone on the project has visibility of the work in progress, or completed.

This guide outlines the tasks required for deployment and recommends which team members are best placed to perform the work. Knowing this information upfront will help your team make decisions and assist with resource planning.

When commencing the project, we work with your Project Team to identify and assign effort in Pivotal Tracker which provides us with an accurate timeframe for delivery, based on identified effort for all stakeholders. This transparency is designed to support both Project Teams through the Onboarding Process.

Regular Project Meetings

Throughout the Onboarding and deployment process, the Customer Advocate will chair fortnightly meetings with your team to ensure that the implementation is on track and any blockages or materials are being worked on by all parties to ensure timely delivery and project success. The online meetings usually run for an hour at most, and are recorded for recording-keeping purposes.

Following Go-Live the online meeting frequency will change to a monthly meeting where the Customer Advocate will chair online meetings using a standing Agenda to ensure we can continue to service your Institution effectively:

- What has gone well this past period
- Outstanding Support Tickets
- eReserve Roadmap and enhancements

This approach will also ensure you are aware of new features and functions.